

NEW SOUTH WALES.

BUSINESS STATISTICS - OCTOBER, 1945.

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PART I. PRIMARY AND EXPORT INDUSTRIES.

SEASON. In the closing days of last week urgently needed rains fell over a large section of the wheat belt, giving promise of higher yields of grain and hay (until then in jeopardy in the south) and of fair summer pasturage. The Riverina and south-western slopes had falls mostly of 2 inches or more; recordings in the Central-west and the very dry southern section of the Western Division were about or exceeding an inch, and good falls were received on the central and southern tablelands and the south coast. Useful rain has fallen on the north coast also, but all coastal areas need soaking rains to restore the seasonal outlook to the promise in the early spring.

WOOL. Appraisements are proceeding in Sydney after the interruption due to the electricity ban. A temporary ban on rail transport of wool has been lifted also.

Without affecting the price payable to growers, selling prices of Australian wool have been revised by agreement between the Commonwealth and U.K. Governments giving an overall reduction for both export and local sales of approximately 6% as from Nov. 1, 1945. From information so far available, it appears that all prices have been brought to an ex-store basis (as the Wool Agreement requires) and in addition to the ex-store price, buyers are to pay a delivery charge of Aust. 0.125d. a lb. In the period Nov. 1, 1945 to June 30, 1946, Australian manufacturers may buy wool at the appraised price plus 10% for shorn wool and appraised price plus 5% for skin wool, or at the official selling price, whichever be the less. In respect of any wool bought below the official selling price and subsequently exported in its raw or any other state the manufacturer must pay also the difference between the price paid and the official selling price.

A subsidy to be paid by the Commonwealth to the Central Wool Committee will offset for it the lower price payable on wool manufactured and consumed in Australia.

Members of the Australian Wool Realisation Commission which is the Australian body of the Empire Organisation - the Wool Realisation Commission - have been appointed. The Chairman of A.W.R.C. is also to be wool adviser to the Government and economic adviser to the Minister for Commerce and Agriculture.

A recent trade opinion, based upon a review of the progress so far made in restoring European manufacturing and prospects in U.K. and U.S.A., is that consumption of wool is unlikely to reach a level resulting in the reduction of the accumulated surplus for some time to come.

WHEAT. The earliest crops in the north-west are being harvested. Heavy wheat yields are assured there and in the eastern part of the central section, and as a result of recent good rains, fair yields are likely in the south except in limited areas where crops had failed before rain fell. When a final estimate is made in about two weeks, it seems probable that the earlier estimate of 51 m. bus. of wheat for N.S.W. may be increased. The 1945-46 Australian harvest may be something like 150 m. bus.

DAIRYING INDUSTRY. The Commonwealth will continue the subsidy on whole milk at the present basic rate until September, 1947. (With the subsidy the average return in the Sydney zone is 20.5d. (incl. 2.75d. subsidy) delivered city basis).

The subsidy to farmers producing milk for butter manufacture has been increased from Nov. 1, 1945, by £750,000 in Australia, equivalent to 0.44d. per lb. of commercial butter. This additional subsidy will continue throughout the year ending March 31, 1947 and will assure a return of 21.5d. a lb. for commercial butter at factory. As from April 1, 1946, the system of varying rates for "flush" and

"off" season months will be replaced by a flat rate - uniform over the year. The subsidy system is to be reviewed on April 1, 1947, but with the proviso that returns in the year ending March, 1948 will at least equal the average basic rate for the preceding year.

The State is proceeding to distribute £170,000 (provided equally by the State and Commonwealth Governments) as relief to dairy farmers producing milk for butter, cheese and dried, condensed or concentrated full milk whose income, due to drought, was less in 1944-45 than in 1943-44.

Stamp duty on pigs slaughtered has been increased from 9d. to 1s. 3d. per pig to restore the Swine Compensation Fund.

In N.S.W. the increase in butter production has not been as marked as seemed likely earlier. More butter was made in August, 1945, than in Aug., 1943 or 1944. In Apr.-Aug. the quantity made was 3.7 m. lbs. greater this than last year but otherwise less than in any recent year and about 40% below the average in those months 1937 to 1939. About 40% more cheese was made in N.S.W. in August, 1945 than in Aug. 1943 or 1944.

BUTTER PRODUCED - N.S.W. FACTORIES.

Period	Average '37-38 to '39-40 m.lbs.	1941 m.lbs.	1942 m.lbs.	1943 m.lbs.	1944 m.lbs.	1945 m.lbs.
July - June	113.9	103.8	85.1	93.8	87.9	71.7
April	10.0	8.7	8.6	6.1	5.2	5.8
May	8.2	6.8	6.8	4.8	3.9	4.5
June	6.0	5.2	5.5	3.7	2.6	3.3
July	5.1	4.6	5.2	3.3	2.4	3.3
Aug.	5.4	4.6	5.3	3.3	3.1	4.0
Total April - Aug.	34.7	29.9	31.4	21.2	17.2	20.9

Increased production of butter in N.S.W. and Queensland (especially) offset a heavy decrease in Victoria and South Australia leaving the Australian total for August much the same this as last year and somewhat greater than in Aug., 1943. Showing similar movements by States, that month's cheese production was slightly less than in 1944 but appreciably greater than in 1943.

BUTTER AND CHEESE PRODUCED - AUSTRALIAN FACTORIES.

Period	Butter (million lbs.)			Cheese (million lbs.)		
	1943.	1944.	1945.	1943.	1944.	1945.
Year ended June	368.2	337.8	307.2	80.6	80.0	77.1
July	16.0	13.8	15.0	3.8	3.5	3.6
Aug.	18.4	19.3	19.3	5.1	5.7	5.6

GENERAL. Meat. The Commonwealth has offered the United Kingdom 12,200 tons of meat representing the saving on Australian and United States service requirements.

Abattoirs. are to be established at a cost of £120,000 each at Dubbo, Goulburn, Gunnedah and Wagga by the State Government for the slaughtering of stock for local, metropolitan and oversea markets.

Live Stock. Restrictions upon the sale and movement of livestock from the County of Cumberland have been lifted.

Importation of Stud Stock from the United Kingdom has been resumed.

Wine. Australia has exported 3,600 tons of wine and 600 tons of brandy to the United Kingdom this year, and the U.K. quota admits of the export of a further 1,400 tons of wine.

Fish. The Legislative Council has amended the Government's amending bill in a manner precluding enforcement of measures to ensure a monopoly to the State marketing organisation.

PART II. FINANCE AND TRADE.

GENERAL. The Fourth Victory Loan was at least £10 m. under-subscribed at the closing date (31.10.45) and will remain open a further ten days.

Oversea Trade. Wartime restrictions on the commercial export from Australia of about 500 items were lifted on Oct. 25, 1945. Civilian goods are now arriving in substantial volume from the United Kingdom.

Maritime War Risk Insurance regulations relating to coastal shipping, which restricted business to the C'wealth War Risks Insurance Board, were repealed on Oct. 25, 1945, opening business to private companies. The current premium rate is 6d. compared with the war-time peak of 15s. per £100.

Delivery Services. Commonwealth enforcement of zoning of ice, milk and bread deliveries is to end on Nov. 30 (bread from Dec. 31) and subsequent policy regarding zoning will be for State determination. The State, however has asked the Commonwealth to continue ice zoning over this summer. Suburban shopkeepers state that home delivery of goods will be resumed next month.

State Accounts. Budget. 1945-46. A surplus of £92,000 is anticipated for 1945-46, compared with an actual surplus in 1944-45 of £986,000. In the aggregate receipts and expenditure, at £70.27 m. and £70.18 m. are £150,000 and £20,000 more, respectively than in 1944-45 if certain extraordinary items are excluded from the latter to give comparability.

In the Consolidated Revenue Fund payments by the Commonwealth remain unchanged, but State taxes are expected to yield £265,000 more than in 1944-45, while expenditure will be £330,000 greater (excluding £3,84 m. provided for redemption of Treasury bills in 1944-45).

Anticipated receipts and expenditure (excluding interest, etc.) are respectively £1,270,000 and £879,000 less for railways; £100,000 and £345,000 greater for trams and 'buses; £23,000 and £23,000 greater for Road Transport and Traffic Fund and £15,000 and £205,000 greater for Sydney Harbour. Net interest, exchange and sinking fund payments are £371,000 less than in 1944-45.

Expenses of the State Housing Commission are excluded from the Budget and will be met from accumulated funds in the Housing account, while the capital cost of rental houses under the Commonwealth-State Housing Agreement will be met from repayable advances from the Commonwealth (£5.21 m.) for this purpose. An allocation of £4 m. has been made in the current State loan programme for land settlement of service men under the War Service Land Settlement Agreement with the Commonwealth.

The State's loan liability to the Commonwealth at 30th June, 1945 was £355.05 m. or £3.08 m. more than a year before. During 1944-45 funded debt increased by £25.21 m. and short term debt decreased from £31.93 m. to £9.80 m.

Accounts for 1945-46. In the combined accounts receipts were £20,000 less and expenditure £220,000 less in September, 1945 than in September, 1944.

In the three months ended September the accounts showed an improvement of £305,000 this year compared with last year, with receipts £291,000 greater and expenditure £14,000 lower. In the Consolidated

/Revenue.....

Revenue Fund receipts increased by £235,000 (with stamp and probate duties £154,000 greater) and payments were £34,000 lower, an increase in departmental expenditure of £56,000 partly offsetting decreased payments for interest, etc. For the quarter, the results of the business undertakings as a whole were £36,000 more favourable, Sydney Harbour and Main Roads accounts showing the improvement of £90,000 and £181,000, respectively, offsetting regressions of £176,000 for railways, £19,000 for trams and 'buses, and of £39,000 in the Road Transport and Traffic Fund.

NEW SOUTH WALES GOVERNMENT ACCOUNTS.

ly to ept.	Revenue (£000)				Expenditure (£000)				Excess of Expend- iture. (£000)
	Consol- idated Revenue	Bus. Undtkgs. £	Main Roads.	Total	Consol- idated Revenue	Bus. Undtkgs. £	Main Roads.	Total	
1944	5,204	9,775	534	15,513	8,908	7,387	647	16,942	1,429
1945	5,439	9,665	700	15,804	8,874	7,422	632	16,928	1,124
ovement	+ 235	- 110	+ 166	+ 291	- 34	+ 35	- 15	- 14	- 305

£ Railways, Trams and 'Buses, Road Transport and Traffic Fund, and Sydney Harbour.

Bank Clearings. In recent months the amount of inter-bank clearings in Sydney has differed little from the amount recorded in the corresponding months of last year. The index number (from which special governmental transactions are eliminated) for Sept., 1945, was a little higher than in Sept., 1944, and seasonally lower than in Aug., 1945. Indexnumbers suggest that the level of business conducted through banking channels has remained steady since the war-time expansion came to a halt toward the close of 1944.

INTER-BANK CLEARINGS, SYDNEY.

Period.	Amount of Clearings (£million) (a)					Index (b)				
	1939.	1942.	1943.	1944.	1945.	1939	1942	1943	1944	1945
Year	932.5	1248.5	1442.3	1499.6	...	100	131	151	156	...
July-Sept.	221.0	304.3	353.5	371.2	374.1	99	133	157	167	167
July	71.2	99.7	114.3	122.9	129.7	98	130	155	168	167
August	74.9	99.0	122.7	127.4	121.0	99	135	160	169	168
Sept.	74.9	105.6	116.5	120.9	123.4	99	134	155	163	166

(a) Exclusive of Treasury bill transactions. (b) Three months moving average: Base (100) is average of corresponding periods of 1926-30.

Retail Trade. In a group of large Sydney stores the value of sales in August, 1945 (25 shopping days) was 16.6 per cent. greater than in Aug., 1944 (27 days). Latterly sales have shown a pronounced upward trend; in the months June-Aug. sales this year were 21.8% greater than in 1944. At the same time new goods have been coming forward in sufficient volume to cover sales and effect some replenishment of the wartime depletion of stocks, but in many directions the supply situation is still very difficult. There are indications that suburban and Newcastle traders' experience has paralleled that of the city stores.

RETAIL TRADE - EXPERIENCE OF LARGE SYDNEY STORES.

Percentage increase (+) or decrease (-) from corresponding period previous year.

Year	Value of Sales.						Value of Stock	
	Apr.	May	June	July	Aug.	June-Aug	Aug.	June-Aug.
1942	(+) 25.6	(-) 8.7	(-) 19.1	(-) 15.6	(+) 5.7	(-) 10.2	(+) 13.4	(-) 7.5
1943	(-) 16.0	(+) 0.8	(-) 1.3	(-) 25.5	(-) 20.7	(-) 16.2	(-) 11.4	(-) 7.6
1944	(-) 8.8	(+) 0.7	(+) 2.7	(+) 3.8	(+) 11.8	(+) 6.1	(+) 4.2	(-) 1.1
1945	(+) 3.0	(-) 9.7	(+) 19.3	(+) 31.6	(+) 16.6	(+) 21.8	(+) 11.9	(+) 17.2

Sales of wearing apparel have been increasing, with reduced coupon ratings a factor, and in some departments (e.g., hosiery) stocks have been reduced appreciably. Boots and shoes, for long in short supply, are available in larger quantities. Marked increases in sales of household piece goods and of furniture and hardware reflect the revival of new house building and in respect of these groups stocks in August, 1945 were only 4.6 and 3.6 per cent greater than a year before. For items other than the foregoing, fancy goods (+ 15.2%) and sports and travel goods (+ 19.8%) were the only noteworthy increases compared with Aug., 1944.

RETAIL TRADE - SALES BY LARGE SYDNEY STORES.

Percentage movement from same month in preceding year.

Month of August.	Wearing Apparel				Household Piece Goods	Furniture and Hardware
	Dress Piece Goods	Women's Wear	Men's & Boys' Wear	Boots & Shoes		
1942	(-) 29.9	(-) 1.3	(+) 1.9	(+) 12.3	(+) 63.6	(+) 9.0
1943	(+) 19.9	(-) 10.3	(-) 22.5	(-) 19.6	(-) 49.9	(-) 40.5
1944	(+) 29.1	(+) 13.2	(+) 14.2	(+) 9.2	(-) 6.5	(+) 10.7
1945	(+) 26.4	(+) 16.8	(+) 27.7	(+) 7.1	(+) 13.8	(+) 21.4

PART III. INDUSTRY, TRANSPORT, ETC.

GENERAL. Unemployment and Sickness Benefits. Particulars of the number of persons who received benefits in the first quarter of operation of the Act are as follow:-

	Unemployment Benefit.	Sickness Benefit.	Special Benefit.
During Sept. Qr., 1945	914	7,860	45
At Sept. 28, 1945	481	4,293	41

Scarcity of work accounted for 62% and physical or mental disabilities for 32% of those on unemployment benefit (of whom 211 or 23% were aged 50 or over) at Sept. 28, 1945.

Electricity. The State Government intends creating an authority to develop and expand electricity supplies, to co-ordinate existing sources and to regulate prices, but not to trade or operate plants.

Airport. Sydney is to be Australia's international airport terminal.

Industrial Disputes continue on the coalfields and the shortage of coal has resulted in some coke ovens going out of production, affecting steel production at Newcastle and aggravating the effects of a stoppage involving 7,000 workers at Port Kembla works. A long-standing dispute in the Printing industry threatens to prejudice food processing and packing industries, and another of wireworkers has caused a shortage of nails etc. in the building industry.

BUILDING INDUSTRY. Private Permits granted for building operations in Sydney and Suburbs in Sept., 1945 were of a value of £767,000 of which £653,000 was for new houses, proposals for which were given a fillip by the lifting of restrictions (on 20.8.45) upon new house-building up to £1,200. The September total was the largest of any month since war-time control of building began, and though still appreciably below the pre-war level for private building, was nearly six-fold the monthly average throughout 1944. If, as seems probable, a strict permit system is re-established under State administration (assumed on Nov. 1) the recent higher level for private building permits may not be maintained.

Government Building also shows marked expansion as a result of house-building operations. Buildings contracted for or authorised on Government account in N.S.W. in Sept., 1945 were of the value of £1,238,000 (£960,000 in the metropolis) of which £966,000 was for new houses. The month's total was a record (perhaps, in part, indidentally so) and about 6½ times that for Sept., 1944. Between the first and third quarters of this year the value of Government buildings increased by 160 per cent.

Government and Private building projects aggregated £2,005,000 for Sept., 1945 and averaged £1,393,000 for Sept. Qr., 1945, compared with £1,274,000 a month in 1940. The value for Sept., 1945, represents a volume approaching pre-war levels, but with the prevailing shortages of building labour and materials (the latter intensified by the shortage of coal and recent industrial disputes) it is certain that current building falls far short of the work for which authority has been given.

VALUE OF PUBLIC AND PRIVATE BUILDING.

Period.	Metropolis			Government		Total, Cols. 1 & 5 (6)
	Private (1)	Government (2)	Total (3)	Country (4)	Total N.S.W. (5)	
Monthly Average Value in £ thousands.						
Year 1940	977	74	1,051	223	297	1,274
" 1944	134	146	280	91	237	371
Jan-Sept., 1945	323	366	689	161	527	850
Mar. Qr., 1945	171	203	374	119	322	493
June " "	247	308	555	107	415	662
Sept. " "	550	587	1,137	256	843	1,393
September, 1944	106	141	247	52	193	299
" 1945	767	960	1,727	278	1,238	2,005

HOUSING. In Sydney and suburbs the number of new houses approved for erection in September, 1945 was 1,188, comprising 623 under private permits and 565 on Government account. This is considerably in excess of pre-war numbers per month for new houses and, for reasons stated above, may be temporarily inflated. However, the revival has been very marked throughout this year. In the metropolis the number of private houses covered by private permits roughly doubled in each successive quarter since the last of 1944, and for the latest was 1,321 compared with 145 in Dec. Qr., 1944. Government house projects increased less evenly, with the numbers in the metropolis 211, 210, 286 and 884 in successive quarters ended Sept., 1945. Government houses arranged for in country areas numbered 55, 82, 56 and 375 in the corresponding quarters.

NEW HOUSES - SYDNEY AND SUBURBS.

	1939	1944	1945							Total Jan. Sept., 1945.
			Mar. Qt.	June Qr.	Sept. Qr.	June	July	Aug.	Sept.	
	Monthly Average number			Number						
Private Government	487	29	87	181	440	224	255	443	623	2,126
	1	37	37	95	295	180	194	125	565	1,280
Total	488	66	124	276	735	404	449	568	1,188	3,406

In September Qr., 1945, water fees were paid in respect of 1935 new houses in the Metropolitan Water Board Area. In this area permits granted in the quarter numbered 1,321 in the metropolitan area proper, 724 in four shires near Sydney, and about 322 elsewhere; a total of 2,367. To this is to be added Government housing projects - 844 in the metropolis and 256 elsewhere; totalling 1,140. Against the grand total of 3,461 new houses arranged for, it is seen that 1,935 or about 56 per cent. were actually commenced, and there were 1,526 yet to be begun. There is ordinarily a lag upwards of a month between securing permit and commencing building, and this direct comparison gives a distorted result because the numbers in September were much greater than in June, 1945. But even so, the figures serve to show that the building industry, in its present strength, is not able to cope with housebuilding projects in the numbers recently authorised.

Railways. Operations of the State railways have been hampered by the shortage of coal and affected by the adverse rural season of 1944-45, and decreasing war traffic. Sleeping cars were discontinued & country time-tables were reduced from Sept. 3, and fewer goods trains were run after July 28, 1945.

In Sept. Qr., 1945, gross earnings were £97,000 less than in the corresponding quarter of 1944 but working expenses were only £2,000 lower.

The State Government has acquired the Silverton Tramway Company's line (32 miles) from Broken Hill to the South Australian system, on behalf of the Commonwealth, in connection with the Uniform Gauge project, preparatory work for which is proceeding. Work has been resumed on the Quay section of the City railway.

After meeting capital charges the railways showed a surplus of £544,903 in 1944-45. Surpluses were £754,054 in 1943-44 and £774,542 in 1942-43.

NEW SOUTH WALES GOVERNMENT RAILWAYS.

Year	Month of September.			Three months ended September.			
	Passenger Journeys	Goods and Livestock.	Gross Earnings	Passenger Journeys.	Goods and Livestock	Gross Earnings	Net Earnings.
	Millions	'000 tons	£000	Millions	'000 tons	£000	£000
1938-39	15.5	918	1,580	46.9	3,632	4,703	1,148
1942-43	18.7	1,714	3,139	56.9	5,075	8,716	2,746
1943-44	20.0	1,678	3,021	60.4	5,182	9,046	2,697
1944-45	20.3	1,602	2,551	61.7	4,932	8,066	2,270
1945-46	21.4	1,360	2,605	65.4	4,384	7,969	1,989

∅ Gross earnings less working expenses - available to pay interest, etc. on railway loan debt.

Trams and 'Buses. Government trams and 'buses in Sydney and Newcastle have had to meet heavier working expenses, while gross earnings (with fares unchanged) and the number of passenger journeys have increased relatively little in recent months. The regression in results of this undertaking is indicated by the movement from surpluses of £33,948 in 1942-43 and £8,124 in 1943-44 to a deficit of £95,027 in 1944-45 (after meeting capital charges and depreciation).

N.S.W. GOVERNMENT TRAMS AND 'BUSES - SYDNEY AND NEWCASTLE.

Year	Month of August.			July and August.			
	Passenger Journeys	Gross Earnings	Working Expenses (a)	Passenger Journeys	Gross Earnings	Working Expenses (a)	Net Earnings (b)
	Millions	£000	£000	Millions	£000	£000	£000
1939	30.3	354	314	60.0	705	622	83
1942	40.7	464	417	80.4	918	821	97
1943	42.9	468	436	83.7	921	861	60
1944	45.7	487	440	89.6	956	863	93
1945	45.8	486	454	95.6	972	908	63

(a) Excluding depreciation. (b) Gross earnings less working expenses, available to meet interest, depreciation, etc. on loan debt.

Motor Vehicles, N.S.W. New vehicles registered in September, 1945, averaged 6 cars and 38 lorries and vans a week, compared with weekly averages of 6 and 71 over the year 1944 and 20 and 14 over the year 1942.

During September, 1945, the number of registered motor vehicles increased by 1,452. Latterly, apparently due mainly to re-registration of laid-up vehicles, the increase in total registrations has accelerated, and in the three months ended Sept., was 3,483 in 1945 compared with 2,921 in 1944. Of this recent quarter's increase, lorries and vans comprised 550 in July, 750 in August and 668 in September, compared with a monthly average of 410 in the preceding six months.

It has been stated officially that a further increase in the petrol ration will not be possible for some time at least. Control over new tyres has been modified somewhat and over retreading has been relaxed greatly.

MOTOR VEHICLES REGISTERED IN N.S.W.

Type of vehicle.	New registrations			All registered motor vehicles.						
	Sept. 1939	Sept. 1944	Sept. 1945	No. at end of -				Increase in Sept.Qr.		
				Aug.1939	July1942 x	Sept. 1944	Sept. 1945	1939.	1944.	1945
	Av. no per week.			000	000	000	000			
Cars	270	6	6	216.6	170.0	181.8	186.1	415	1,377	606
Lorries & Vans	126	66	38	77.6	70.9	78.9	84.9	906	919	1,968
All vehicles ø	396	72	44	329.2	267.4	288.9	301.8	1,447	2,921	3,483

ø Total cars, lorries and vans only for new registrations.

x Lowest war-time number of cars.